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FinancialPlanning

Wealthtech Weekly

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By Rob Burgess
Reporter

Saving time and money are music to an advisor's ears. And while free artificial intelligence tools may offer both, they also come with huge headaches.

Besides cost, they lack features that keep client data safe. Goes to show, that there's no free lunch.

Do you use paid or free AI tools? Let me know — robert.burgess@arizent.com.

I hope you'll check out the article, along with the rest of this week's stories.

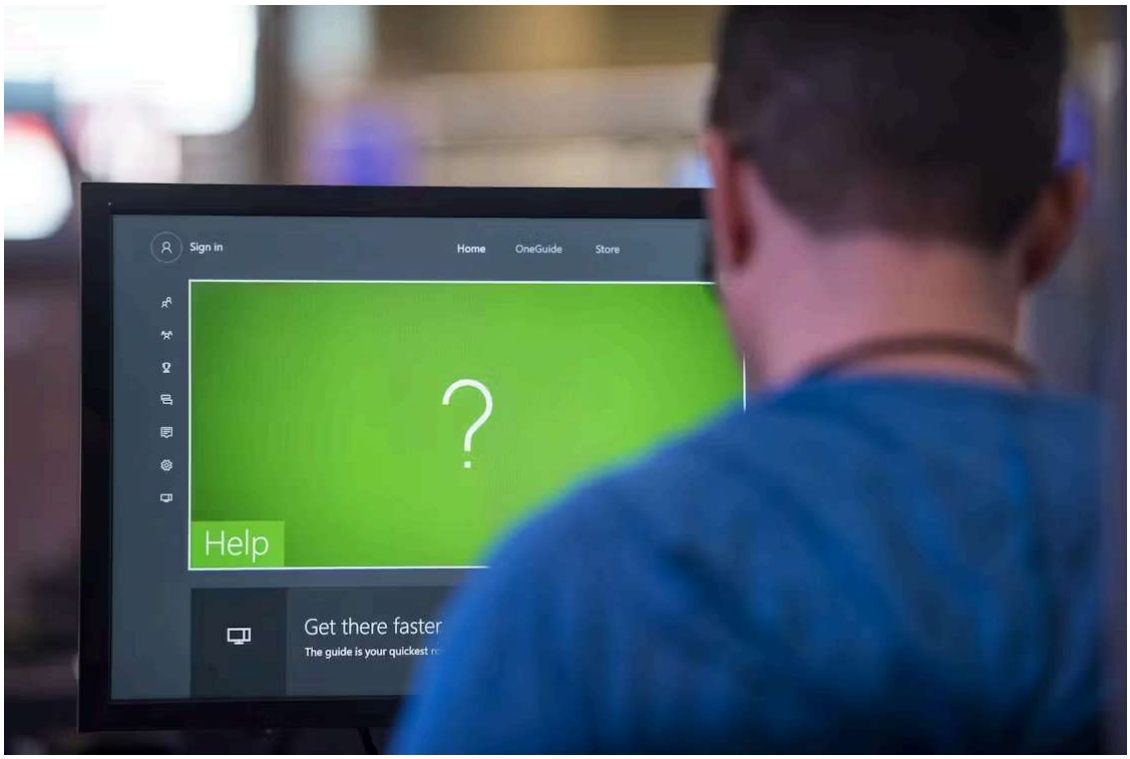
As always, thank you for reading. Talk to you next Thursday!

Connect with Rob:

TOP STORIES

TECHNOLOGY

Free AI tools fall short for advisors handling client data



The hidden costs of free AI tools go beyond simple feature upgrades. Non-enterprise versions of AI tools often lack advanced data protection features.

- **How advisors reduce year-end stress and avoid burnout**
  Year-end client meetings, Dec. 31 deadlines, oh my. It can be a lot, but it doesn't have to be overwhelming.
- **Cryptocurrency's wild ride in 2025**

After the newly crypto-friendly Donald Trump won reelection, bitcoin jumped over $100,000. Many advisors and even more clients remain skeptical, though.

- **Empathy can't be automated — neither can financial guidance**
  Artificial intelligence isn't an algorithmic takeover but an essential wealth management tool.
- **Don't think AI will replace you? That's this CEO's goal**
  As Financial Planning's AI Readiness Survey showed, most advisors aren't concerned about their own jobs. But others aren't so sure.

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